

# Budgeting for Mean, Lean Times

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## A Savvy Budgeter's Checklist

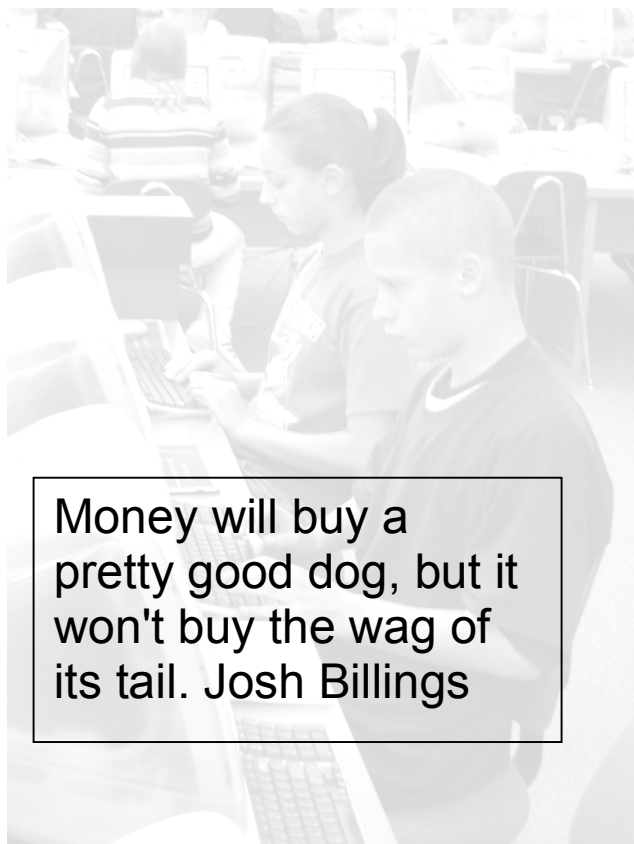
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### Budgeting for Lean, Mean Times

Based on a track record of building, obtaining and administering excellent library/technology budgets on both a building and district level, the presenter discusses current funding realities facing schools, gives a short primer on school district finance, describes types of budgets, outlines the elements of effective budgets, and suggest ways media professionals can increase their influence in the budgeting process.

Arithmetic is being  
able to count up to  
twenty without taking  
your shoes off.  
Mickey Mouse.

Money will buy a  
pretty good dog, but it  
won't buy the wag of  
its tail. Josh Billings



**1. I know I have an ethical obligation to submit a budget even if it has not been requested or the chances of it being fully funded are slim.**

*ALA Library Code of Ethics Statement I: We provide the highest level of service to all library users through appropriate and usefully organized resources; equitable service policies; equitable access; and accurate, unbiased, and courteous responses to all requests.*

It is ethically irresponsible *not* to have a budget. Too often we confuse having a budget with having a fully funded budget. Every library needs to have a written, goal-oriented, specific proposed budget. If students are to have access to the resources necessary for an effective educational program, all school library media specialists (SLMSs) must accurately inform decision-makers the cost of those resources. The greater outlays necessary for technology in schools, among other things, makes this more critical than ever.

As informational resources become available in both in print and digitally, we need to carefully appraise which format best suits curricular purposes and our budgets. Collection development strategies are more important than ever as our scarce resources need to be stretched to cover ever higher demands. Materials purchased “just in case” or for a “well-rounded collection” that remain untouched by human hands are not just unwisely, but unethically, acquired.

No matter how poor a district may be, odds are that it has at least one exemplary, well-funded program. Maybe it’s science, maybe it’s the debate team, or maybe it’s girls’ tennis. It may as well be the media/technology program. By following some good budgetary practices and a few backyard political strategies, it is not only possible but probable that a media specialist can make his or her program the district’s shining star.

*Good budgeting is your responsibility.*

Building media specialists will play an increasingly larger role in determining the funding for their programs as many school districts move toward decentralization. As funds are given to buildings, site teams will determine staffing and resources. District media supervisors, superintendents, and even principals will have less ability to support or protect programs.

*A good budget can increase the effectiveness of your program even if the effort does not result in increased funds.*

As much as I hate sounding like Newt and Rush, I have to say more money is not always the answer to better services to staff and students. A good budget requires planning, prioritizing, and accountability. When those things are done, better programming is the result - even without an increase in funds.

**Notes:**

## 2. I can counter the argument that the free Internet will not replace libraries, books and purchased online information sources.

I haven't seen it, but I hear there is a bumper sticker that reads, "Libraries for people who can't afford modems." A somewhat extreme sentiment to be sure, but one that echoes these more common statements that you, as an educational leader, may have overheard:

- *"Now that we have the on-line encyclopedia, we don't need to buy the print version."*
- *"Buying books is investing in an out-dated technology. All the information anyone needs will soon be available on the Internet - for free."*
- *"These on-line fees will have to be taken out of your magazine budget."*
- *"Our new school won't need a library media center since all the classrooms will be networked."*

What motivates otherwise knowledgeable principals, superintendents, school board members and legislators to advance such ideas? Some of it is wishful thinking about ways to reduce expenditures in times of tight budgets. We are all under the gun to provide, as our financial director says, "high quality education at low bid costs." But many question simply stem from a lack of knowledge about how teachers and learners use media center resources and what the Internet actually contains.

### *Digital and electronic resources are complementary.*

Good teachers and media specialists understand how different resources in school library media centers are used for different purposes and how these resources are complimentary. In schools with active, resource-based programs, the following scenarios are commonplace:

- a student comes in for a novel, and in passing an empty terminal, runs an Internet search on the book's author to see what the author may have published recently.
- a student using the electronic card catalog to research Egypt now finds not just the books in the geography and history section, but locates books on mythology, alphabets and costumes—since a key word search turned up Egypt in the those books' annotation fields.
- a teacher finds a brief reference to a historical figure in the electronic encyclopedia, and now checks out a print biography.
- a student doing research on a country in a print atlas requests a digitized map which can be modified with a paint program and imported into a word processed report.
- a teacher, having stirred the curiosity of his class with the tape of a satellite broadcast on plate tectonics, now wants a cartload of books on geology.
- a class doing research on diseases scatters—some students head to the print reference sources, some to the Internet terminals, some to the CD-ROM terminals, and some to the multimedia lab since no single source can accommodate all the learners in the class and each resource contains unique information.

Adding technology to a media center is like a strip mall adding a new store—all the stores get more traffic and higher sales. Experienced teachers and media specialists know that it takes newer technologies and print together to create meaningful learning experiences. This will be the case for some time. Humans are not given to simply replacing old technologies with new ones. Television did not replace either radio or motion pictures. Video photography has not replaced still photography. Computers will not replace books.

One reason this assertion can be confidently made is that print and electronic resources each have their own strengths. As Walt Crawford states succinctly, "A book is the best way for me to communicate a fairly lengthy and complex narrative discussion." It's also the best way for a reader to encounter such a discussion. Even most die-hard technology lovers will admit to printing hard copies of a documents much longer than a page, since today's monitors are just plain hard on the eyes. The cost savings supposedly gained by having library users read information from the computer screen quickly evaporates when *every* reader starts printing out lengthy texts. It may not be high tech, but print resources on a cost-per-user basis are dirt cheap.

### *The all digital library is not about to happen.*

Budget-makers who wistfully believe the end of having to lay out cash for information on paper is in sight really need to read Crawford and Gorman's *Future Libraries: Dreams, Madness & Reality* if they hope to make fiscally responsible decisions about obtaining information resources for schools. These two electronic information experts patiently debunk the claims of an all-digital information future - at least for the foreseeable future. Their conclusions include:

- the use of books, magazines and newspapers is not in decline, but actually growing
- monitors that are as easy to read as a printed page have not yet been invented
- large scale digital conversion and storage of current print resources (given today's technologies) are impracticably expensive
- an all electronic library is not financially feasible
- there is no such thing as a "free" Internet or and computing isn't really getting less expensive

*Both print and electronic resources have their strengths.*

Remember as well that when using books and magazines, our student researchers are usually getting carefully edited and verified information. Unlike the Internet where anyone can (and does) present credible *looking* material, publishing houses go to great lengths to protect their reputations by ensuring their writers are expert and authoritative. The cost of print includes not just the paper, ink, and cover, but careful editing, including fact checking. Joey Rodgers, Executive Director of the Urban Library Council, proposes that a sign be hung over library books shelves that reads "CAREFULLY SELECTED BY PROFESSIONALS," and that a sign be displayed by the Internet terminal that simply reads "WHATEVER."

Electronic resources, including the Internet, certainly have their place. Both my students and I love digital indexes and the multimedia features of electronic encyclopedias and other reference materials. Ephemeral, date critical information can sometimes only be found on the web. E-mail is the most efficient means to tap into the wonderful primary sources called human experts. And the Internet provides an interactive medium in which students can produce and communicate ideas, not just gather those of other writers.

Don't take away either my electronic resources or my books. Both are needed to provide students with information of both currency and depth. And keep in mind that a true media program is not simply a collection of any kind of materials——print or electronic. It is a vital combination of resources, curriculum, activities, and professional expertise that help students acquire not just information, but the skills and judgment to make good use of that information.

**"...the Web: One-third retail, one-third porn, and one-third lies, all of our baser natures in one quick step." Stephen Carter, *The Emperor of Ocean Park***

**Notes:**

### 3. I understand the concept that school district budgets are a “zero sum” game.

*There is only so much money to be distributed.*

In light of the current political climate about taxes, those of us in public education should revisit David Lewis’s *Eight Truths* about budgeting. His first Truth is just as applicable now as it was when published in 1991: “It is a zero sum game.” When talking about public library budgets, he explained: “There is no more money...The important truth is that those who provide the cash...will not give the library any more. They can’t because they don’t have it.” Schools, as well, seem to have reached a level of funding that the public is unlikely to substantially increase (if not decrease).

Does this mean no additional funds for your media or technology program?

*Getting more money for your program means spending less money elsewhere in the school.*

Not necessarily. Mr. Lewis suggests a way that middle managers (like library media specialists and technology coordinators) can get more money for their programs: “You can take it away from somebody else. If you believe in what you are doing, you have an obligation to try this.” Gulp.

I think this puts an awful lot of us outside our comfort zone. Aren’t we really “givers” of resources, skills, information, time, and effort? Fighting for an adequate budget, especially if it means butting heads with co-workers like department chairs, band directors, coaches, custodians, or union reps, certainly feels like being a “taker.” Want to make an enemy? Threaten the funding of a program that is owned by another educator.

But look carefully at the second part of Mr. Lewis’s statement - “If you believe in what you are doing, you have an obligation to try...” Folks, we better all believe deep in our hearts what we are doing is in the very best interest of our students and community, that spending what is necessary for an effective media and technology program is better than buying new textbooks or violins or smaller class sizes.

*You have to believe in your mission.*

So here’s the deal. You really need two psychological weapons when fighting to make your program a budget priority: a thick skin and a deep-felt mission. Without them, you’ll get eaten alive; with them, you can accomplish anything.

Strong feelings and fearlessness are of course greatly helped by a strong rationale for your budget. Today’s budgeting committees really need to be asking questions like:

- What programs teach the skills that will be vital to tomorrow’s citizens?
- What programs, skills and attributes does your community believe are important?
- How many teachers and students will benefit from a particular spending decision?
- Are there other sources of funds for activities which could be considered “non-essential?”
- How might a budget decision affect the school’s climate?
- Is there research to support the effectiveness of a program or specific spending decision?
- How much budgeting is being done out of respect for sentiment or tradition?

As media specialists and technology coordinators, we need to do our homework. Our budgets must be specific, goal driven, and assessable. They must be both accurate and easy to understand. (Learn how to use a spreadsheet - you’ll never regret it.) And I hope our budgets are supported by research and sound reasoning. It’s up to us to let other educators know what the Colorado study (among others) found out about the impact of libraries on student achievement, about Krashen’s research on how libraries help improve reading scores, and what research says about the impact computer technology has on teaching and learning. It is up to us to know and understand the curricular aims and objectives of the entire school and how we can help teachers meet them,

Finally a last quote from Mr. Lewis, something to think about when you have a few quiet moments: “It is unacceptable for others in your organization to misuse resources that could be better put to use by you.” Thanks, Mr. Lewis, for helping us see that we need to learn to be effective “takers” if we want to be good “givers.”

**Notes:**

#### 4. I can describe the “consequences” of an under-funded budget in concrete terms.

*What won't happen may be as important as what will happen.*

While it would be great if newspapers would do our work for us (see article in the box on the right), we need to make the case ourselves that inadequate or reduced library funding will have an impact on school programs, the classroom curriculum, and student achievement.

##### *Specificity and goal orientation*

This is easier to do if your budget proposals are specific and goal driven. In visiting with the person or team that makes budget decisions, you can say things like:

- I won't be able to purchase the 25 books that support the revised 9<sup>th</sup> grade history class the teachers requested.
- Teachers will only get one ink cartridge for their printers this year instead of 3 as in past years.
- Only four students will be able to use the research terminals in the library at a time.
- With the reduced clerical staffing, I won't be able to maintain the school webpage.
- Students will not be able to participate in the state's children's book award program.

You will need to use your very best interpersonal skills to make sure these predicted outcomes don't simply sound like threats. Give budget decision-makers the entire budget and be open to their ideas about how to economize.

##### **Notes:**

*From Low-budget libraries have high cost*

By Mary Shanklin and Lori Horvitz  
Orlando (FL) Sentinel, November 10, 2002

Despite growing evidence that a dynamic school library increases reading scores, what was once the academic backbone of Florida's schools is becoming little more than a warehouse for old, useless books.

An Orlando Sentinel investigation of school libraries across the state found a system educators call a national embarrassment. Outdated books occupy shelves. Untrained clerks oversee dozens of media centers. Libraries close frequently for testing and picture days.

Although Gov. Jeb Bush and the Legislature have spent millions of dollars to improve student reading skills, state funding for school libraries has remained the same since 1999 -- \$15 million a year. That flat-line trend came at a time when the student population grew by more than 120,000 children. Today, among large states, only California has more students per librarian than Florida.

The crunch was heightened when lawmakers removed the requirements that library money be used for libraries. State spending has held steady as librarians bought more computers and book costs spiraled -- nonfiction prices jumped 19 percent last year alone.

...But neither computers nor worn, outdated books can help children hone their reading skills as much as a professionally staffed library that is stocked with interesting books, Hart said. To learn to read, children must practice. If they can't find the right book they are less likely to pick one up, he added.

At Zellwood Elementary, students cannot get copies of this year's heralded Sunshine State books, a cornerstone of state reading initiatives. Without the books, students cannot participate in the state's Sunshine State Young Readers Award program, which was created by media specialists to encourage reading.

Instead of books such as The School Book, a popular Sunshine State volume, Zellwood students find books such as Stars of the Modern Olympics on their library's shelves. Although published in 1967, the book contains no information about Olympians since the 1920s.

...At Christina M. Eve Elementary School in Miami-Dade, Principal Elvira Pupo could afford only four aides for the entire school. She decided that two dozen teachers would share three aides and the librarian would have one for herself.

A media specialist without an assistant is only a clerk, Pupo said, and a library with only a clerk is no longer a library.

"It's a warehouse," she said. "And there is no meaningful learning going on."

Pupo credits her media center in large part with her school getting the state's top writing scores the past two years.

...The differences between libraries operated by professionals and those operated by clerks are clear, say library experts. Unlike clerks, media specialists are trained to collaborate with teachers, apply for grants, discard old books and teach.

Media specialists make a difference in other ways, too. When special events close the library at Lawton Chiles Elementary in East Orange, children can check out books using the Internet and have them sent to the classroom.

## 5. I can write an outcome driven budget that is specific in supporting curricular and school improvement goals.

### *Types of budgets.*

There are a variety of ways to create budgets. Alice Warner describes six:

- lump sum
- formula
- line or line item
- program
- performance or function
- zero-based (Warner, 1993)

While it is good to know the distinctions among these budget types, they can basically be divided into two groups - those that are arbitrarily created and those that are outcome driven. How does budgeting work in your school: Are you given a sum of money and then told to make the most of it, or do you develop an effective program and then ask for the money to support it? If you are doing the former, change to the latter.

Get out your spreadsheets, and clearly show decision-makers how much money your program requires if it is to be effective. How can anyone give you what you want, if you yourself can't determine it or communicate it? Be sure they know the consequences in terms of student learning of an unfunded or underfunded budget.

Know and follow district budgeting schedules. If your capital outlay requests are due February 15, then have them in on the 14th.

### *Good budgets have three components:*

Good program-driven budgets have three major components:

- goals - this is the effect my *funded* program will have on student learning
- specificity - this is how much money I want, and this is exactly how I will spend it
- assessment - this is how I will be able to tell you if the money you give my program helped it met its goals

Too often budgets have relied on state or national standards as a rationale for funds for resources and collection building. (The Colorado study shows..., *Information Power* says..., *School Library Journal* reports...) Just as there is cynicism about the political process across the nation, so is there a general distrust in statistics. The belief that statistics don't lie, but liars can use statistics is deeply and widely felt. (After all, 86% of all statistics are made up.)

### *Use local needs and objectives:*

Communicate information about standards and studies, but build a budget based on the specific needs of your individual curricula, students, and teachers. The fact that Mrs. Green's science students need more current and varied resources for their solar system unit will carry more weight than any state rule or national standard.

Relate your budget to your district's or building's long-range plans.

### *Use an advisory group (see section 10)*

Remember also that media budgets which come as a recommendation of a media/technology advisory committee carry more weight than those developed by the individual media specialist. Who wants to turn down a whole group, especially if that group includes parents, students, and teachers?

### **Notes:**

## 6. I know a variety of sources for budget dollars and who controls those dollars including:

**Federal dollars**

**Grant dollars (all grants, not just library-specific grants)**

**Principal's discretionary budget (and what "budget dust" is)**

**PTA/PTO spending**

**Staff development dollars**

**Foundation monies**

### *Consider your (re)sources*

Schools get funding from a variety of sources. The percentage that any one of these sources contributes to a budget can widely vary from state to state, and even from district to district. But nearly all public schools get some funds from:

- A state aid formula is usually a baseline amount paid to all districts on a per pupil basis. It comes directly from the state budget.
- Local revenue, often from property taxes, is often a large percentage of many states' school budgets. It is this source of revenue which can create large funding disparities among districts.
- Special bond levies are usually passed to fund new buildings or sometimes large investments in technology. These usually require a public referendum.
- Federal funds in the form of block grants, Chapter grants or special grants. These monies are a small percentage of most school budgets, but are critical to specific programs.
- Private dollars from educational foundations, parent organizations or endowments are becoming increasingly important to districts with lots of community involvement and some wealth.
- Private and government agency grants can be a source of revenue for specific projects which address specific needs. Competition for large grants is becoming increasingly fierce, and good grant writing takes time, experience and talent. *Rather than writing library-specific grants, you may be better off collaborating with other grant writers who may need library and technology resources.*
- Fund raisers can make small amounts of money for those who wish to hold them. Book fairs, candy sales, and car washes are best sponsored by a "Friends of the Media Center" than directly by school personnel.

Budget makers need to exercise caution if they rely too heavily on funding sources from outside the regular school operating budget. If media and technology programs are to be viewed as core to the educational process, then funding for them should be from the regular school budget.

### *Learn about your district's budget*

How much money does your school operate with each year? Where exactly does that money come from and where does it go? How much Block Grant money is available? What other special levies or grants are around? What is the budget for staff development? Your school's business manager can help you determine these budgets. They are by law public information. Visit with your school board representative and get his or her perspective on finance and the budget.

Take some time to learn how local tax rates are determined. Be prepared to take some time if you seriously want to understand these often Byzantine formulas. Learn the difference between capital funds and general funds. Know what tax abatements are. Take a school finance class at the local university. You will be able to amaze your friends, baffle your enemies, and never have to worry about running out of stimulating conversation.

Like other media specialists, I have taken my budget requests to my principal and been told there is no money in the budget. My follow-up questions then asked, "Is there money in the budget for textbooks? for band uniforms? for the office copier? for summer school?" If the answer to any of those questions was yes, then both the principal and I knew that the question was no longer one of "is there money in the budget," but "how do we choose to spend the money in the budget?" An important difference that opens the door to budgeting for reasons rather than tradition.

### *Learn who controls the budget.*

Does the superintendent in your district traditionally distribute funds? The building principal? A hands-on kind of school board? Is the money allocated to buildings on a per pupil basis, and then controlled by a site-based decision making committee? Is there a Block Grant committee? Knowing to whom to submit a budget proposal is critical

### **Notes:**

**Budget dust.** A good time to ask for money for a special project or piece of equipment is 30-40 days before the end of the school's fiscal year. Principals and others may be looking for ways to spend the small balances of their discretionary accounts (budget dust).



## 7. I can list the areas for which I need to budget.

### Budget form

Item	Relevant data	Rationale/goals to be met/department requesting	Amount requested
<b>Library books and reference material maintenance</b>	Collection size Replacement % Average cost per title	Maintenance of current collection <i>(See part 8)</i>	
<b>Library books and reference materials growth</b>	User requests/program goals	(This may include new units, building goals, commitment to standards, etc.)	
<b>Periodicals</b>	Number of titles	Person or department requesting (as attached list)	
<b>Online subscriptions and fees</b> (periodical databases, online encyclopedias, online tutorials, etc.)	Specific titles and amount of previous year's use.		
<b>Pre-recorded video</b>	Collection size Replacement % Average cost per title	(This may include new units, building goals, commitment to standards, etc.)	
<b>Computer software</b>	Number of terminals Teacher requests	(This may include new units, building goals, commitment to standards, etc.)	
<b>Licenses and support costs</b> (for library systems, servers, etc.)	Specific programs requiring support licenses.		
<b>Library supplies/computer supplies/blank video and audio tapes/promotional materials</b>		(Be specific as possible. Show allocation per teacher if the library is responsible for providing.)	
<b>Library equipment - maintenance</b>	Current amount Replacement % Average cost per replacement	Maintenance of current inventory. <i>(See part 8)</i>	
<b>Library equipment - growth</b>	User requests/program goals	(This may include new units, building goals, commitment to standards, etc.)	
<b>Classroom equipment - maintenance</b>	Current amount Replacement % Average cost per replacement	Maintenance of current inventory. <i>(See part 8)</i>	
<b>Classroom equipment - growth</b>	User requests/program goals	(This may include new units, building goals, commitment to standards, etc.)	
<b>Other items specific to my program or school:</b>			

### Notes:

## 8. I can create a maintenance budget.

Administrators understand maintenance. They regularly budget for replacing roofs, tuck-pointing brick work, and resurfacing parking lots. They understand why windows, furnaces, and pencil sharpeners all need to be replaced now and again.

What these fine folks don't always understand is that library collections and instructional technology should be regularly maintained as well. Use the following formula with your collection, share the results with your budget people, and see if it makes a difference.

### Doug's Magic? Formula for a Maintenance Budget

Here's one way to calculate what funds you should be spending to keep your resources up-to-date:

**Maintenance budget = replacement rate X total number of items X average cost**

(replacement rate = 100%/number of years in the life span of material)

#### *Examples:*

If a school has 50 VCRs which cost \$100 each and have a life span of 10 years,  
then the maintenance budget for VCRs should be 10% X 50 X \$100 or \$500.

If a media center has 15,000 volumes with an average cost of \$14 per volume with an average life of a book at 20 years,  
then the maintenance budget should be 5%\* X 15,000 X \$14 or \$10500.

(\*Remember the replacement rate is 100%/life span or 1.00/20 or 5%)

Here's one for you to try:

A school has 40 computers with a life span of 5 years. The average replacement cost of a computer is \$1000. How much should be spent each year to maintain the computers?

Replacement rate = 1.00/ \_\_\_\_\_ years

Maintenance = \_\_\_\_\_ X \_\_\_\_\_ X \_\_\_\_\_  
Replacement rate    Total number of items    Average cost of an item

or

\$\_\_\_\_\_ maintenance budget.

#### Notes:

## 9. I report to budget decision-makers how past budget dollars have been spent.

One powerful way to convince others you should be given additional funding is to remind them how successful you have been with your past budgets. Remind them about how many people your program serves and how much of the curriculum depends on it. Get others on the staff to support your budget or items in your budget.

Don't just deal in numbers either. Let folks know how individuals, both teacher and student, have been helped by your program. The one common denominator that all effective salespeople have is the ability to tell a good story - to personalize the facts. Hey, and who can tell stories better than we can? "You should have seen the kids lined up before school opened to get into the media center to use the new computers. You all know how Johnny Smith never gets excited about anything in school. If you'd have seen him find the NASA website, you wouldn't have recognized him."

*Sample report form to be shared with principal and leadership teams. Include with budget proposals*

### Library Media Department Year End Report for the 20\_\_-20\_\_ School year.

Number of students \_\_\_\_\_

Number of staff \_\_\_\_\_

#### Circulation statistics:

Number of print materials circulated (average per student): \_\_\_\_\_

Number of print materials circulated (average per teacher): \_\_\_\_\_

In-library circulation of print materials (average per day): \_\_\_\_\_

Use of online resources by school (provided by provider): \_\_\_\_\_

#### AV materials circulated:

TV/VCRs \_\_\_\_\_

Computers \_\_\_\_\_

Portable computer labs: \_\_\_\_\_

AlphaSmart labs: \_\_\_\_\_

Tape recorders: \_\_\_\_\_

Video cameras: \_\_\_\_\_

Other (please list): \_\_\_\_\_

#### Use and Service

Classes held/hosted: \_\_\_\_\_

Lessons taught: \_\_\_\_\_

Drop in users (ave per day): \_\_\_\_\_

Computer lab reservations: \_\_\_\_\_

Before and after hours user (ave per day): \_\_\_\_\_

Other uses: \_\_\_\_\_

Comments:

#### Collections:

Number of books acquired (all sources): \_\_\_\_\_

Number of books deleted: \_\_\_\_\_

Number of AV materials acquired (all sources): \_\_\_\_\_

Number of AV materials deleted: \_\_\_\_\_

Number of software programs acquired (all sources): \_\_\_\_\_

Number of software programs deleted: \_\_\_\_\_

#### Program goals for the year and a short summary of the extent to which those goals have been met:

- 1.
- 2.
- 3.

#### Instructional highlights and special programs or activities

Please share a minimum of three instructional highlights for the past year.

#### Please concerns you may have about the media program

## 10. I know how an advisory committee can help build budget support.

### *Advisory Advice*

No, this section is not sponsored by the Department of Redundancy Department. I am advising you to form an advisory committee if you don't already have one.

Such a group can be a great help for the media specialist or technology coordinator at either the building or the district level. My advisory committees have given me terrific ideas, huge challenges, and timely warnings over the years. The first group I formed was just a few teachers and a couple of parents from the high school where I was the media specialist. For a little wine and cheese, these wise folks would leave their families and far more interesting activities to come to my house and talk about libraries and computers and how adolescents learn best. We hammered out an articulated vision of what a media program should do. They helped me set my professional goals, and then listened when I reported my trials and triumphs. It was the best deal I ever made. My advisory committees have become larger and more formal since that time, but they still serve very much the same purpose: to help me make better decisions.

### *Qualities of an effective advisory group.*

After having been served by and served on a number of these groups, I offer some advisory advice:

- Keep your group small. Any committee much larger than a dozen is difficult to get together and difficult to bring to consensus. If you need a much larger representation, keep your full meetings few and do most of your work in sub-committees.
- Work for a wide representation of stake holders who serve limited terms. My current committee is comprised of teachers, students, board members and administrators, of course. But parents, business people, a multi-type library representative, and post-secondary educators also serve. Our computer coordinator and network manager are permanent members. Next year I would like to add a representative from community education. As our schools work to become more of a whole community asset, this person will be important. We don't have a set selection process for membership, but no one serves for more than 3 years. Remember when selecting your members, that communication is a two-way street. What your representatives learn at your meetings will be taken back and shared with that person's colleagues. Great public relations.
- Have few, but important, meetings. Advisory committees only need to meet 3 to 4 time a year. A fall meeting is a good time to establish working subcommittees and refine the year's goals. One or two meetings to work on budget or policy issues in the winter and a final spring meeting to review the year's work and set objectives for the coming school year are usually enough. Setting our meeting dates for the year at our first meeting makes them a priority for many members. Take attendance, and include who is there in your minutes. There are several guides to running effective meetings on the market. Buy one and read it. Your committee will thank you, and it beats trying to remember Roberts Rules of Order.
- Send out good agendas and write clear, concise minutes which are quickly distributed. If members see agenda items which they think are important (how the budget to be divided up this year, for example), they'll be more likely to attend. All my advisory group members use e-mail and we rarely send hard copies of anything through the mail. I e-mail myself a copy of all agendas and minutes for easy filing and retrieval.

### *Well-defined responsibilities.*

- Finally, give your group well-defined responsibilities. A committee should not be making your professional decisions for you, but it should have the power to shape the direction of the media/technology program. And well it should, since these folks, as well as you, will be held responsible for the program's weaknesses as well as its strengths. My advisory committee works on:
  - long range planning and goals
  - setting my department's yearly objectives
  - creating budgeting formulas and procedures, and reviewing building technology plans
  - policy making

And that's about all the work we can do.

Ours can be a professionally lonely profession. In all but the largest schools, there is rarely more than a single media specialist or tech coordinator. We are outnumbered by kindergarten teachers, custodians, coaches, special education aides, and administrators. An advisory committee is one way of giving ownership of the media technology program to a body of stake holders in the building. If the goals, the budget, the assessments, the long range plan are known to be important to more than just a single person, when they are presented to decision-makers they will carry more weight. And if your advisory group includes parents, community members and students, it will be seen as a very important body indeed.

### **Notes:**

## 11. I know the importance of serving in school, professional and political organization leadership roles.

### *At the school level.*

Volunteer or run for governing committees. I am always shocked by how few individuals in an organization want to be decision makers. Serving on these bodies always takes extra time. But hey, one learns to love those 7:00 am meetings.

Make a list of groups who make decisions in your school. Do you have:

- A site council or a committee that writes building goals and improvement plans?
- Curriculum committees?
- Staff development committees?
- A parent-teacher organization?
- Committees that interview and select new staff members?
- Textbook selection committees?
- Accreditation team?

If you have a chance to take a decision making role and do not, you've lost all whining rights about the choices that are made for you.

### *Work with other groups.*

There are other groups in schools which have educational goals and political agendas, some of which may be closely aligned with those of the library media program. Our district has a legislative committee which meets during the sessions. We formulate a list of three or four items we feel are of particular importance to our district, and find ways to let our local legislators know about them.

Nearly all state and national associations with educational affiliations have legislative platforms - the school board association, administrators associations, parent-teacher organizations, the NEA and AFT, etc. These organizations often hold forums for local politicians. Attend, get informed and get active. Our state library and media organizations sponsor a yearly library legislative day which gives librarians and media specialists from around the state a chance to visit with their legislators. Usually the school media people are scarce at this gathering. Join us.

Is one of your faculty, a neighbor, or church member in the legislature? Schmooze. Write letters. Send e-mail.

### *Participate in local politics.*

County political party meetings and fund raisers often give you a chance to visit with a variety of local politicians. It's always nice to be able to start a conversation with your senator by saying, "As we were discussing at the fall fund raiser..."

Help pass bond issues and elect school board members. Members of the community who have children in school and therefore a vested interest in schools are becoming a smaller and smaller percentage of the total population. It's therefore taking increasingly more work to get referendums passed and progressive board candidates voted in.

Offer to give short talks at service groups like Kiwanis, Sertoma, and Lions. Inform the community about your program, and fill the talk with specific times your program helped individual students.

Of course one can always make the ultimate sacrifice: run for office. We all wanted to know about the skeletons in your closet anyway!

### **Notes:**

## 12. I can use technology to improve my budgeting and communication skills.

Actions do speak louder than words! What better way to convince decision-makers of the power of information technology, than by using technology when creating and presenting a budget. These tools are ones which every budget maker needs to master:

### *A spreadsheet*

While they come with a variety names, features, and price, all spreadsheets basically do two main tasks for budget makers:

- they allow you to easily add and subtract numbers
- they allow you to display those numbers in readable columns and rows or as charts and graphs

Budget makers can create easily “what-if” scenarios using a spreadsheet: If books average price changes to \$14.50 from \$14.00, what is the impact on the total budget? What if we order 50 computers with 128mg of RAM rather than 512mg of RAM?

Spreadsheets are also an efficient means for keeping track of the money you have allocated. A simple bookkeeping system which records the date, purchase order number, vendor, item and amount can do wonders in solving any discrepancies between your records and your business office’s accounts.

For most purposes, the spreadsheet included in an integrated software package like AppleWorks or Microsoft Works has all the features you’ll need, and it is an easy tool to learn. Microsoft Excel is the defacto standard in spreadsheets, however, and is no more difficult to use than the integrated spreadsheets.

### *A word processor*

One of the most popular refrains in writing classes has always been, “Does neatness count?” It did, and it still does.

A clear and readable narrative of your budget helps “sell” it. Good organization, correct grammar and spelling, and a clean layout are all more easily accomplished using a word processor. A sophisticated user can create use bulleted items for eye appeal and ease of reading, select appealing fonts for impact, and add graphics for illustration and interest. Robin William’s classic book *The Mac is Not a Typewriter* is an excellent primer for effective document layout.

Again, the word processor in most integrated software packages has enough features to create professional-looking documents. Good integrated software also makes it easy to add spreadsheets and charts to the budget narrative.

### *A presentation program*

When pitching your budget to a decision-making group, a computerized presentation program can help your audience literally “see” the points you are making.

Full colored slides containing text, illustrations, graphics, charts, animation, and sound are created on a computer and then displayed on projection screen using an LCD projector. These are displayed as the presentation is given. Sophisticated presentation programs give you the ability to create lists of bulleted items which “fly” onto the screen to create a “build,” create links to other slides or other programs, and use a variety of dissolves when changing slides. The stand alone presentation programs also include ready made backdrops, layouts, chart makers, and clip art.

While you can create a slide show using AppleWorks, this is one application that calls for the features of a stand alone program. Microsoft PowerPoint all gives the presenter the ability to make effective shows. The program also comes with “wizards” which help new users create professional-looking presentations. A word of caution: Practice with the equipment well in advance of giving the presentation. You don’t need technical concerns getting in the way of getting your message across. (See my column “Slide Show Safety” for additional tips.)

### **Notes:**

### 13. I know why I need to weed. (Doug's pet peeve).

I once took over a job from Evelyn who had been a school librarian for 20 years. During her tenure, she never threw *anything* away -- literally. Most of the books were of an age that they could drink. Many could and should have retired. One book had not been checked out since two weeks prior to Pearl Harbor.

The reason I can state with confidence she threw nothing out is because the bottom left drawer of her desk contained nearly a dozen years of the Sports Illustrated swim suit editions in pristine condition. Happy, happy Doug!

I could just envision Evelyn's dilemma. "I can't put this out but I can't throw it away. I can't put this out but I can't throw it away. I can't put this out but I can't throw it away." It must have cost her sleepless nights.

I thought about Evelyn and weeding after reading Minnesota's recently released state-wide study of its school library media programs <[www.metronet.lib.mn.us/survey/index.cfm](http://www.metronet.lib.mn.us/survey/index.cfm)>. Modeled after the Colorado and other state studies, it contains lots of interesting data. But one part of the study just jumped right out at me. The average copyright date of a book sitting on the shelves on our state's school libraries is 1985. Ouch.

The first article I ever wrote for professional publication appeared in School Library Journal way back in 1990 and was called "Weeding the Neglected Collection". It told how and why I tossed about half of the books on Evelyn's shelves. The recently released study is a clear indication that my advice to weed was ignored 13 years ago. So I will try again.

Poorly weeded collections are not the sign of poor budgets but of poor librarianship. Period. Only two things can happen if library material replacement budgets are inadequate. The collection ages if the librarian does not weed. The collection gets smaller if the librarian does weed. That's it.

#### *Rationale for weeding.*

Small, but high quality collections are infinitely better. And this is why. Continuous, thoughtful weeding:

- **Rids your collections of sexist, racist and just plain inaccurate materials.** And you've been complaining about the Internet being a source of bad information! Any books about the 48 states? That predict that one day man will land on the moon? In which the Soviet Union is still a major political power? My favorite weeds were these:
  - Boy Electrician
  - Boy's Book of Rifles
  - Boy's Book of Great Detective Stories
  - Boy's Book of Tools
  - Boy's Book of Turtles and Lizards
  - Boy's Book of Outboard Boating
  - Boy's First Book of Radio and Television
- There was no "Girl's" book of anything, but if there had been, I'm sure it would have been of cooking, sewing, or dating.
- **Makes the good stuff easier to find and more appealing.** Kids (and more than a few adults) do judge books by their covers. Publishers design bright and attractive book jackets and paperback covers for a reason. One reason folks gave for not using a library is that the books are physically dirty. Few students are willing to plow through dozens of books with nasty old worn-covered books to get to a good one. (Now that I think of it, that's a pretty good reason to clean the fridge now and again too.)
- **Sends the message that the library may not be adequately funded.** If you went into your neighbor's pantry and saw the shelves filled with boxes of breakfast cereal, you'd conclude your neighbor had plenty to eat. But what if those boxes were empty? Shelves filled books of no value are the equivalent of pantries full of empty cereal boxes. Visitors don't look very hard at book collections. They only see whether shelves are empty or full. Your budget is unlikely to increase if the perception is that you have a library full of materials already.

One very sweet library media specialist came up to me after I gave a talk on budgets in which I railed about weeding. "But, Doug," she said, "if we weed, our collection will be too small for our school to meet our accreditation standards." My tongue-in-check advice was to replace the books with those fake book jacket pieces one finds in furniture stores if the standards only required quantity not quality. Whether directly stated or not, I am quite sure her accreditation standards call for usable books, not just any books in the library

Download Betty Jo Buckingham and Barbara Safford's Weeding the Library Media Collections (See resources.) It's an authoritative guide that will give you confidence.

Whether fortunate or unfortunate, many people regard books as sacred objects and have difficulty throwing them away. An industrial arts teacher at Evelyn's school glares at me to this day, claiming he hurt his back climbing out of the dumpster into which I had thrown away some "perfectly good books." What he did not understand and we need to remember is that it is not books that are sacred, but the thoughts, inspiration, and accurate information they contain.

Weed! I'm not telling you again.

#### **Notes:**

# Common Sense Economy

“Share everything.” Robert Fulgham, *All I Really Need to Know I Learned in Kindergarten*

In times of tight funding, decision-makers in schools ironically forget that libraries were invented because information resources are often scarce. Clay tablets, papyrus scrolls, vellum manuscripts, and even the printed book have all been rare, expensive to create, and unaffordable by many individuals. Humans, being the social, clever and trusting creatures that they are, figured out that information could be held in a single location and then systematically shared among a group. Libraries were born.

So why today do many educators seem to think of library media centers only in terms of costs rather than savings? Perhaps we need to remind them that LMCs help maximize the use of resources by:

## 1. Creating a common pool of shared materials

There is not much argument among educators today that reading ability improves when kids read more, and that readily available reading materials help make that happen. Book fairs, “guided” reading kits, and classroom libraries are all designed to put more books into the hands of more kids. And “that’s a good thing.”

When things get tight financially, however, doesn’t it make sense to go back into a sharing mode? Classroom collections can and should be drawn from strong school library collections. Besides economy, the collections can be rotated to keep reading materials fresh. The real beauty of a common collection is that materials purchased for individual units get double or triple duty: in gifted programs, ELL programs, and by students pursuing individual interests. I just despise the thought of a wonderful resource, tightly locked in a teacher’s cabinet for 90% of the year.

As Fulgham in the opening quote suggests, we should share. It is not only the moral thing to do, but a smart financial move as well. It’s cheaper to buy a book for the library and share than it is to buy one for each classroom. Duh!

## 2. Tracking materials

It plays to the stereotype, but yes, part of the job description of the SLMS is to make sure the “stuff” is accounted for. We do stamp/engrave/sticker, catalog, circulate and inventory common school property. We remind students (and teachers) that materials should be returned in a timely manner, especially when there is a high demand for those materials.

When materials go directly into the classroom, not only are they far less likely to be an asset for the entire school, but they may not be available for long even for students in individual classrooms. Teachers rarely have as good a system for tracking who has what material out. When teachers change classrooms, buildings or districts, the materials often go with them. Even “classroom” materials, should be inventoried and tracked by the school library media center, whether they are specially purchased classroom libraries, AV resources, or equipment. When teachers retire, resign or transfer, part of the exit procedure should be a clearance from the library.

## 3. Selecting the most useful materials

Spending \$1000 on new materials, of which only 20% are used, is no better than having spent \$200. Because of training, access to reviews, knowledge of the whole school curriculum, and just plain old experience in knowing what kids like, the SLMS is very, very good at picking materials that will really be used

## 4. Promoting and teaching the use of materials

Like many states, Minnesota provides some common, commercial online resources to all schools. But according to the director who oversees these databases, some schools use them heavily, others very little. All schools in the state are now “wired,” share a common set of academic standards, and have children that are all above average. Why the difference in how much these state-provided resources are used?

While I don’t have quantitative evidence (yet), I’d be willing to bet real money that the schools that use the databases have a SLMS that is aware they are available, teaches others how to use them, and promotes their use.

No book, magazine, database, video, web page or computer program jumps off the shelf into a potential user’s face and says, “Here I am, here’s how to use me, and here’s why you should use me.” The SLMS is the voice of those resources. Educational dollars are wasted when materials remain “untouched by human hands.” And even sadder than the waste of money, is the loss of learning opportunities these resources could provide.

A few years ago, those of us representing libraries at a state legislative day wore buttons and carried balloons that carried Anne Herbert’s fine words: “Libraries will get you through times of no money better than money will get you through times of no libraries.” Perhaps we should wear those buttons all the time and put a balloon on every superintendent’s and school board member’s desk.

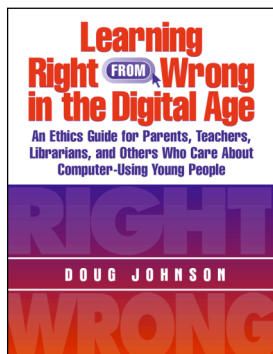
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D. Johnson <dougj@doug-johnson.com> -----page 16



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